Proposed State IT Project Reporting Requirements

Dell Ford, PMP
Manager, State CIO Project Management Office

1. Defining Vital Signs and Threshold Values

Vital Signs Report Card

The best way to track a project's health is by measuring its vital signs. In this report card, most signs are measured by the variance between the project's current status and the plan. It also uses a point system: The greater the variance or potential problem, the more points it is assigned. After the project manager measures the vital signs, he or she can assign status—healthy, caution or danger—and a course of action.

At this step, the sponsor and project manager select the appropriate vital signs and, depending on the project's complexity, decide how many points to assign and what threshold levels to set for the caution or danger stage. The vital signs and numbers listed here are frequently used by companies that have adopted this methodology.

Vital Signs	Variance	Points
Project Schedule: actual vs. plan % difference in days	< 10% 10% to 20% > 20%	0 1 2
Milestones: actual vs. plan % goals completed on time	< 10% 10% to 20% >20%	0 1 2
Deliverables: actual vs. plan % goals achieved	< 10% 10% to 20% > 20%	0 2 4
Unresolved Issues[1] # issues vs. deliverables to be completed	No Issues[2] < Deliverables > Deliverables	0 1 2
Cost to Date: actual vs. estimated[3] % over or under budget	< 10% 10% to 20% > 20%	0 1 2
Resources: actual vs. planned % difference in staff, equipment, etc.	< 10% 10% to 15% > 15%	0 2 4
High Probability, High Impact Risk Events e.g., technology failure, loss of sponsor, key personnel	1-3 Risks 4-5 Risks 6-7 Risks	1 3 5

Healthy (1- 8)
The project's performance is on track; the variances are within acceptable limits.

Caution (9 - 15)
The project's performance has deteriorated beyond the project manager's ability to improve it. It is now at risk of becoming a runaway project. If the steering committee wants the project to be completed, the project sponsor needs to take charge of the situation and devise a plan to fix the problem(s).

Danger (16+)
The project has reached runaway project status; not even the project's sponsors can fix it or get it back on track. At this point, the project steering committee needs to take a serious look at the project's viability, and either shut down or save the project.

1 Issues are unanswered questions and differences of opinion.

2 It is seldom that a project has no outstanding issues. Therefore, make sure when the value here is 0, that there are really *no* outstanding issues. The 0 value could be a sign that issues are not being tracked.

3 In case of fixed-price contracts, change the variances to <5%, 5% to 10%, and >10%.

Vital Signs	Variance	Points
Project Schedule: actual vs. plan % difference in days	< 10% 10% to 20% > 20%	0 1 2
Milestones: actual vs. plan % goals completed on time	< 10% 10% to 20% >20%	0 1 2
Deliverables: actual vs. plan % goals achieved	< 10% 10% to 20% > 20%	0 2 4
Unresolved Issues[1] # issues vs. deliverables to be completed	No Issues[2] < Deliverables > Deliverables	0 1 2
Cost to Date: actual vs. estimated[3] % over or under budget	< 10% 10% to 20% > 20%	0 1 2
Resources: actual vs. planned % difference in staff, equipment, etc.	< 10% 10% to 15% > 15%	0 2 4
High Probability, High Impact **Risk Events** e.g., technology failure, loss of sponsor, key personnel	1-3 Risks 4-5 Risks 6-7 Risks	1 3 5

Vital Signs Report Card

Healthy = (1 - 8 Points)
Variances are acceptable and the project is in good shape.

Caution = (9 - 15 Points)
This project is in trouble and is beyond the Project Manager's sole ability to recover. The Sponsor's involvement is crucial if recovery is warranted.

Danger = (16+ Points)
The project is a runaway and beyond the Sponsor's ability to recover. The steering committee must intervene and either shut the project down or implement a recovery plan.

PROJECT STATUS REPORT

Project Name:

Prepared by:

Date MM/DD/YYYY:

Reporting Period:

Create links to referenced documents (e.g., Link_To_...) by using Insert → Hyperlink on your toolbar.

1. Executive Summary

Overall Status:

	Green [1] (Healthy and Controlled)	Yellow [2] (Caution)	Red [3] (Danger or Critical)	Reason for Deviation
Budget:	[ ]	[ ]	[ ]	
Schedule:	[ ]	[ ]	[ ]	
Scope:	[ ]	[ ]	[ ]	
Quality:	[ ]	[ ]	[ ]	

[1] Project is within budget, scope and on schedule.
[2] Project has deviated slightly from the plan.
[3] Project has fallen significantly behind schedule, is forecast to be significantly over budget, or has taken on tasks that are out of scope.

Comments:

4

Strategies for IT Project Success

1. Don't cut corners, methodologically. In the long run, this results in system failure or an inadequate system that doesn't meet the users' needs.
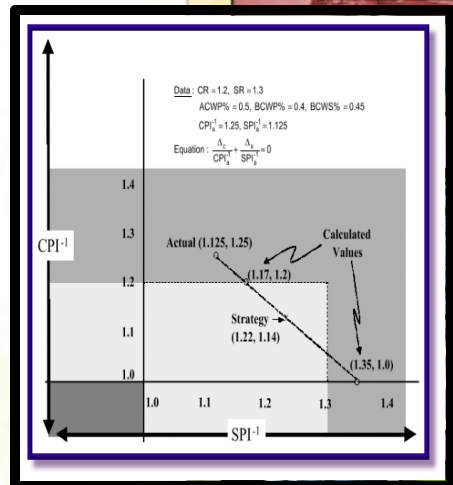
2. Audit each major deliverable and step along the way for accuracy and correctness.

3. Carefully monitor top management support for the project. Make sure that managers are aware of the progress of the team.

4. Secure the correct technical lead for the project.

5. Use the right "tools" for the job.

6. Develop and Monitor Project Vital Signs

PROPOSED Project Manager's Calendar

Neg	Fri	Fri	Fri	Thu	Wed	Tues
8	7	6	5	4	3	2
16	15	14	12	11	10	9
23	22	21	20	19	18	17
32	30	28	27	26	25	24
39	38	37	36	35	34	33

Vendor Project Management Training

Beverly Cummings, PMP
Director of Training, State PMO

Project Categories

Four Hour Orientation

Minor Technology Projects
Small Technology Projects
Major Technology Projects
Multi-agency and Enterprise Technology Projects

Project Status Reporting

Schedule

Milestones

Risk

Issues

States Methodology

Forms and Templates

Project Management Tools

We Value Your Input

Reporting requirements

Training requirements

Contract provisions

Methodology and templates

Code of conduct

Educate senior executives to the value of project management

Promote a project management professional within South Carolina State government

Project Management Web Site

www.cio.sc.gov

bcummings@cio.sc.gov

Questions